

STATE BOARD OF EQUALIZATION DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Business Taxes Specialist I		Business Taxes Specialist	
UNIT/DISTRICT/LOCATION		POSITION NUMBER	
Program Analysis Section (SUTD)		290-454-4380-XXX	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	R01	2	None
FINGERPRINTS REQUIRED		SUPERVISION EXERCISED	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		May act as lead person	

Job Requirements

Knowledge of:

- Provisions of the tax laws and regulations administered by the State Board of Equalization, related legal opinions and court decisions, and departmental policies, rules and regulations.
- Organization and function of the State Board of Equalization, particularly the Sales and Use Tax Department.
- General business law and accounting principles and practices.
- Basic auditing and compliance policies and procedures.
- Board and departmental administrative goals and policies.
- The Board's IRIS and ACMS automated systems.

Ability to:

- Effectively apply the required knowledge.
- Perform duties of a highly technical nature.
- Interpret and apply tax laws, regulations and audit and compliance procedures objectively and without bias.
- Meet with and obtain the cooperation of persons subject to tax regulation and persons from other Board sections or state agencies.
- Prepare clear and concise reports, letters, and memoranda.
- Communicate effectively orally and in writing and make effective presentations.
- Represent the higher levels of authority at meetings, hearings and conferences.
- Work independently and discreetly with confidential information.
- Use a personal computer and other standard office equipment.
- Work in a high rise building.
- Travel to various field offices.

Desirable Qualifications

- Strong research and communication skills.
- Ability to work independently and with initiative.
- Ability to organize and prioritize a dynamic and highly complex workload.
- Flexibility in interpreting tax statutes, regulations, policies and procedures.
- Proficient in use of a personal computer and working with software packages such as Word, Excel, PowerPoint, and relational database programs for preparing letters, reports, spreadsheets and data analysis presentations.
- Familiarity with ACL software, SQL, Visual Basic, and utilizing the internet for data mining.

Statement of Position

Under the general supervision of the Supervising Tax Auditor III, Program Analysis Section Supervisor, the Business Taxes Specialist I (BTS I), is responsible for independently completing the most complex and sensitive assignments as requested by the section supervisor and Sales and Use Tax Department (SUTD) management. The BTS I evaluates the audit and compliance program for effectiveness and efficiency through the development and use of statistics (metrics) and other program and industry-specific indicators that may have overlapping audit, compliance, administrative, and legal issues. As directed by the Section Supervisor, the BTS I is responsible for independently completing assignments and preparing periodic analytic reports regarding complex or sensitive audit and compliance program activity issues. BTS I may also be involved in performing onsite evaluations. Travel may be required up to 10% of the time.

Candidate must be able to perform the essential job functions (*) with or without reasonable accommodations.

PERCENTAGE OF TIME SPENT	DUTIES
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50%	*Acts as a highly skilled technical analyst on audit and compliance practices, policies and procedures. In this role, the BTS I evaluates the SUTD audit and compliance program for effectiveness and efficiency through the development and use of statistics (metrics), audit plans, managed audits, and industry-specific indicators that may have overlapping audit, compliance and administrative elements. The BTS I independently reviews related audit or compliance program issues and policies, analyzes audit and compliance data, and provides advice to Board management on proposed actions as supported through statistically developed projections and findings.
35%	*Independently researches, requests and compiles data to formulate solutions and generate periodic reports for the audit and compliance programs. Evaluates highly technical and sensitive audit and compliance issues. Researches and analyzes new and existing data sources to enhance and streamline compliance and audit programs through innovative data mining techniques and "Business Intelligence" methodologies. Consults with the Data Analysis Section, Technology Services Department, CROS, external stakeholders, and BOE Management to analyze and resolve difficult and unique program activity issues, and prepares responses to complex audit and compliance program matters.
10%	*As directed, represents the Section Supervisor at meetings, conferences and hearings and acts as a Sales and Use Tax Department liaison with other agencies. Takes actions, makes recommendations and prepares reports as necessary as a result of the meetings and conferences.
5%	Performs other job-related duties as required.

I have read this duty statement and fully understand my assigned duties.

EMPLOYEE'S SIGNATURE

DATE

I have reviewed these duties with the above named employee.

SUPERVISOR'S SIGNATURE

DATE